



# Syssero<sup>®</sup> Solution Packet

Create Custom Report from Standard Report



# Solution Overview

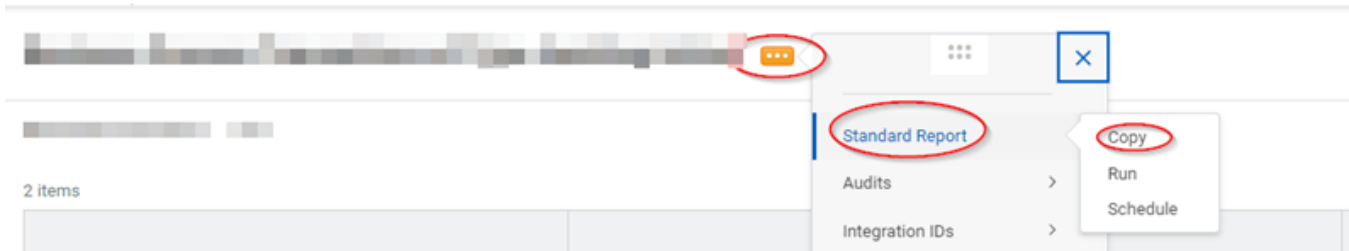
The creation of custom reports from standard reports is often driven by the need for more tailored data analysis and presentation. This customization allows for the addressing of specific business requirements, integration with additional data sources, compliance with unique regulatory needs, and optimization for better performance and scheduling. By modifying standard reports, organizations can ensure that the information presented is precisely aligned with their unique operational, strategic, and compliance objectives, thus enhancing the overall utility and effectiveness of the data provided by Workday.

## Impacted Functional Areas

- Reporting

### Step 1: Select the Standard Report to Customize

Navigate to the standard report you would like to customize. When you run the standard report, you can navigate to the related actions beside the report name and choose **Standard Report | Copy**



The other option is to use the task “Copy Standard Report to Custom Report” and choose the standard report name you’d like to copy.

In this example, we will create a custom report to show on which step a person is on an in-flight Business Process. The Standard Report we will use is “Business Process Transactions of Type Awaiting Action”.



Once you choose to copy, you can name the report whatever you would like. Common practice is to put "CR" for "Custom Report". If you keep the same name as the original report, remove the "Copy" at the end of the report name. Please see note below on making the report temporary.

## Copy Standard Report to Custom Report

Name	* <u>CR_Business Process Transactions of Typ</u>
Report Type	Advanced
Data Source	All Business Process
Temporary Report	<input type="checkbox"/>

You may make this a temporary report if you only need it for a short period of time, like a few days. (The system will delete automatically.) Otherwise, if it is a report you will use repeatedly, do not make temporary.

### Step 2: Customize your report

After clicking "Ok", you'll be directed to the edit screen. Here, you can add or remove columns (fields) as desired. To add a field, click the (+) next to the field line where you want the new field.

In the search box, either type the field name or select "All" to view all available fields for the Business Object. For this guide, select "Business Process Step Awaiting Action".

Columns   Sort   Filter   Subfilter   Prompts   Output   Share   Advanced

8 Items

	Object	Field	Column Heading Override
<input type="checkbox"/>			
<input type="checkbox"/>	× Action Event	× Business Process Transaction	
<input type="checkbox"/>	× Action Event	Search	
<input type="checkbox"/>	× Action Event	By Category	
<input type="checkbox"/>	× Action Event	All	
<input type="checkbox"/>	× Action Event	Global Fields	
<input type="checkbox"/>	× Action Event	Other	
<input type="checkbox"/>	× Action Event	Create Calculated Field for Report	

To create a new column (field)

To search for available fields for the report based on the Business Object



For this report, we will choose “Business Process Step Awaiting Action”.

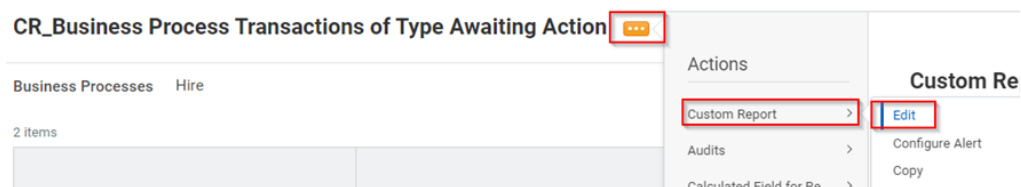
Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
8 Items							
(+)	Order	*Business Object	Field	Column Heading Override			
(+ -)	▼ ▼	× Action Event [🔗] [☰]	× Business Process Transaction [☰]				
(+ -)	▲ ▼	× Action Event [🔗] [☰]	× Business Process Step Awaiting Action [☰]				
(+ -)	▲ ▼	× Action Event [🔗] [☰]	× Awaiting Persons [☰]				

### Step 3: Setting Up Report Filters and Sharing

Click on the various headers to set up any report filters, sub-filters, and define report prompts. You can choose to show, hide, or use standard prompts. This step also allows you to share the report with others as needed.

For more detailed information on custom reports, refer to [Workday Documentation: Concept: Custom Reports](#).

Once your report is set up to your liking, click “Ok” at the bottom and to run your report, click “Run”. If you need to make any adjustments later, you can always edit the report by selecting “Custom Report | Edit” from the related actions.



We hope this helps! For help or more info, reach out to [info@syssero.com](mailto:info@syssero.com)